

Review update: New RefWorks

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Citation for this version and the definitive version are shown below.

Citation to Publisher Zhang, Yingting. (2019). Review update: New RefWorks. *Doody's Collection Development Monthly*. <http://dcdm.doody.com/2019/07/review-update-new-refworks/>.

Citation to this Version: Zhang, Yingting. (2019). Review update: New RefWorks. *Doody's Collection Development Monthly*. Retrieved from [doi:10.7282/t3-qtqs-b172](https://doi.org/10.7282/t3-qtqs-b172).



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Review Update: New RefWorks
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Introduction

Over two years ago, I wrote a review of the new RefWorks that was published in the November 2016 issue of Doody's Collection Development Monthly. The original review can be viewed at <https://dcdm.doody.com/2016/11/a-review-of-the-new-refworks/>.

RefWorks is a web-based citation and research management tool provided by ProQuest. Users from subscribing institutions can access this tool either via a single sign-on or login at <https://refworks.proquest.com/>.

Students and faculty use RefWorks to collect references from various sources and store them in the cloud-based RefWorks libraries or DropBox for offline access. With RefWorks, users can organize and manage the collected references in their research process, cite references and create bibliographies while writing their research papers.

RefWorks still has two versions: Legacy RefWorks and New RefWorks. When the original review was written, it was said that the legacy RefWorks would be retired, but this plan did not materialize. It appears that ProQuest does not plan to discontinue Legacy RefWorks. At the time of this review, both versions can still be used simultaneously.

This review update is to address the changes including new features, enhancements, and fixes that have been made to the new RefWorks. Some of the characteristics that were missing in the original review but were worth mentioning are also included. Below are the noted changes to the new RefWorks since the original review.

New Features and Enhancements

- **Projects.** One major change is the addition of the Projects feature. Projects are useful when a researcher is working on multiple research projects at the same time and s/he would like to keep them separate. In this case, the researcher can create different Projects (libraries) to store and manage references separately for different research projects. Projects can be named according to the research topics or other considerations for easy identification. The default Project name is Untitled Project, which can be renamed as needed. Each Project (library) can have unlimited number of folders and subfolders for organizing references. Because references in one Project cannot be copy-

pasted or drag-dropped into another Project, it is important that users should specify which Project to use as the current Project before they add new references. However, in case a user accidentally placed references in a wrong Project, s/he could export those references from the wrong Project and then import them into the desired Project. When inserting in-text citations and bibliographies in a Word document, users should choose the appropriate Project first in the RefWorks Citation Manager (RCM), as they can only insert references from a single Project. Users can share a Project or selected folders within a Project with collaborators who also use New RefWorks. This Project sharing feature will enable all the Project owners to add, delete, and modify the references and folders in the shared Project. The owners can also remove duplicate references from the shared Project.

- **Display Options.** More display options are now available in New RefWorks. References can be displayed in four views: Normal View, Table View, Full View, and Citation View. The Table View display allows users to arrange the references by RefID (RefWorks new unique identifier), Author, Title, or Last Modified tab in an ascending or descending order. The folders and subfolders are now marked with the reference counts making users easily see how many references are kept in that folder or subfolder. Also the pull-down menus for selecting the number of references, the view type, and the sort option to display are now placed at the top of the screen for more visibility. The number of references to be displayed is now up to 2000 per page. All these new features and enhancements can help researchers to scan and screen references for systematic reviews.
- **Find Duplicates.** Users can search their RefWorks library for duplicate references. The methods used to identify duplicate references have been changed from Strict Match and Fuzzy Match to what are now called Exact Match, Close Match, and “Legacy” Close Match. In the Exact Match method, the three fields (titles, authors, and publication dates) in a reference must match exactly. However, in the Close Match method, RefWorks compares the same three fields and the data are weighed for their similarity. If there are enough similarities, the references will be considered duplicate. In the “Legacy” Close Match, RefWorks adopted the "Close" matching algorithm from its legacy RefWorks. However, the Find Duplicates feature does not apply to shared folders, though deduplication of references is supported in shared Projects. Duplicate references can be removed into the Deleted tab in the left pane. The deleted items will remain in the trash bin for 30 days. After that, they will be permanently deleted.

- **Direct & Indirect Export.** Most online bibliographic databases offer the function of direct export to RefWorks. However, to export references from PubMed, after selecting desired references, in the “Send to” menu one needs to choose “Citation manager” and then “Create File” to download the selected references. Then in RefWorks after opening the desired Project and choosing an appropriate folder or folders, one needs to click Add to import the references and then select NLM PubMed as the format of the file to have the selected references finally imported into RefWorks. This indirect exporting process involves several steps and is not favorable to the health sciences researchers.
- **Save to RefWorks to Capture Web References in a Project.** Save to RefWorks is a browser bookmarklet. It allows users to capture references from the internet directly into RefWorks. When a web page is open, after clicking Save to RefWorks, users will be prompted to choose a Project to store the web reference. The default Project would be the one that was most recently viewed.
- **Manual Entry of References.** When manually entering citation information into a RefWorks library for an item that is not electronically available, after choosing a reference type, users may only need to enter the reference title. RefWorks will try to figure out the rest by matching the item title to those in the ProQuest databases. The system will display a few likely matched items under the “Did you mean one of these?” bar. If a matching record is found, users just need to click the Save button to add it. This feature makes the manual process less tedious and more efficient.
- **All Documents Tab Renamed.** The All Documents tab, which includes all the references in a library, has been renamed All References which is more appropriate; after all, very often not all the references have full text documents attached.

Breakthrough

The implementation of Projects, the availability of Table View, the indication of reference counts in folders and subfolders make RefWorks a potential tool to scan and screen references for systematic reviews. As mentioned in the original review, RefWorks add-on to cite references in Google Docs is a unique feature that is very convenient for those in favor of using Google Docs to write papers. I would like to conclude this review update with the same ending sentence as the one in the original review: “This easy-to-use reference management tool can be easily adopted by students, undergraduates in particular.”